Sales Packages

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Sales Packages

Menu path: Setup > Proposal Setup > Sales Packages

In SalesAutomation, Sales Packages are required when creating a Quick Quote. You can define as many sales packages as you need. A Sales Package consists of one or multiple elements – Items, Parts and RMR.

These are some possible scenarios:

- Items, parts, and RMR
- Items only
- Parts only
- RMR only
- Items and parts only
- Items and RMR only
- Parts and RMR only
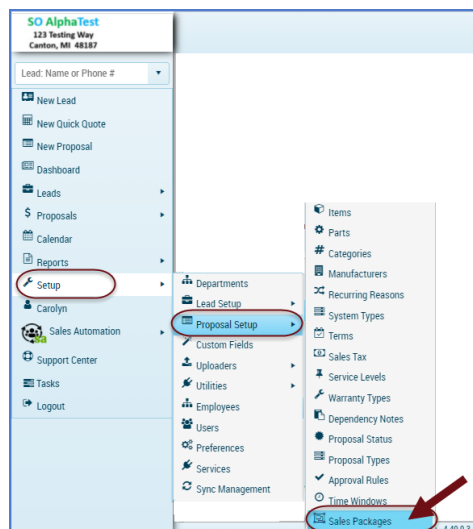
When creating a new Sales Package, you must first fill in the Name and Description fields, and then select a Job Type from the drop-down list. Save the record and then re-open in edit mode to select the Labor Item, Labor Rate, Labor Cost, Discount Item Discount %, and Discount Amount. You may then add the elements of the package on the tabs in the lower tier of the form.

Job Type: Defined in SedonaOffice (details in the SedonaOffice setup defined earlier in this document.)

Note: Item selections may be limited based on the Job Type selected.

In our example, we are creating a residential intrusion sales package that will contain an Item, Parts, RMR, and

Questions.

Adding an Item to a Sales Package

In the lower tier of the form, click on the Items tab, and then click on the Add Items button.

The Add Items list will be displayed. Check the box to the left of each non-recurring Item that will be a part of the sales package. When finished, click the Add Items button at the lower right.


After adding the Item, it will appear in the grid area of the Items tab. Enter the Rate, Item Cost, and Labor Units. If you do not have all the information needed to fill in these fields, you can save the sales package and edit these fields later.

Sort	Item Code	Item Description	Qty	Rate	Tax?	Amount	Item Cost	Total Cost	Labor Units	Total Labo...	Base Item In...	Item Dependency Note	Alt Description		
	Install Burg Res	Install Intrusion System	1	$1,500.00	Y	$1,500.00	$650.00	$650.00	6.00	6.00	No				

Adding Parts to a Sales Package

In the lower tier of the form, click on the Parts tab, and then click on the Add Parts button.

The Add Parts list will be displayed.
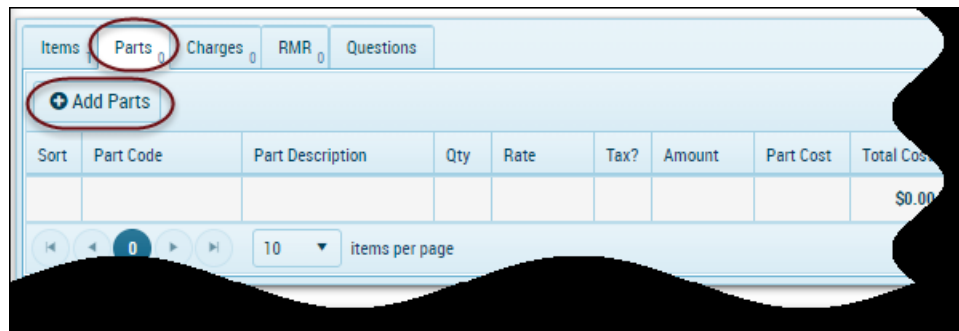
Check the box to the left of each part that you want to add to the sales package, and then click the Add Parts button at the lower right of the list.

After adding a Part, it will appear in the grid area of the Parts tab. Depending on the Job Type selected for the Sales Package, the Rate column may fill with the price of each part. If the Rate defaults to zero, this indicates you are selling the system under an Item code. If rates default and you are selling the system under an Item code, zero out the rate field. Enter the quantity for each part in the list. If you do not have all the information needed to fill in these fields, you can save the sales package and edit these fields later.

Charges Tab

The Charges tab will display all Items selected on the Items tab, and all Parts selected on the Parts tab. There is no data entry required on this form.

Adding RMR to a Sales Package

In the lower tier of the form, click on the RMR tab, and then click on the New RMR button.

The Edit [RMR] form will be displayed. Select an Item, Billing Cycle and enter a value in the Monthly Amount field. When finished, click the Update button at the lower right. Repeat the process if you need to add additional RMR.
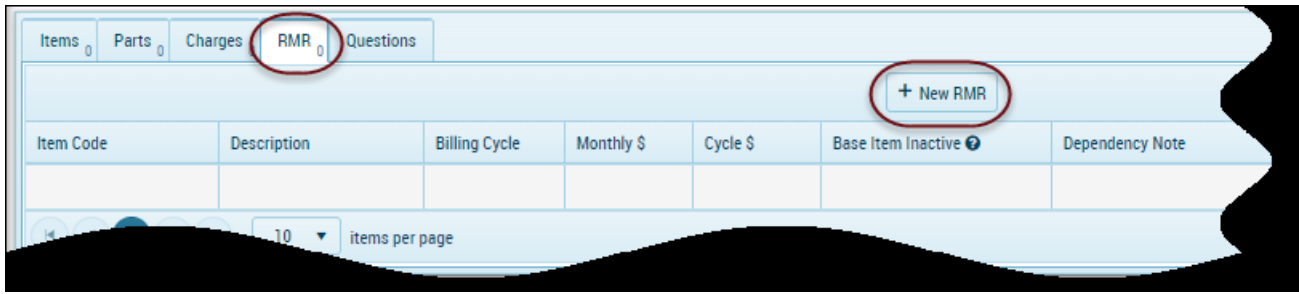
Once the RMR is saved, it will appear in the grid area of the RMR tab.

Adding Questions to a Sales Package

The Questions tab is designed to gather and save information from the sales lead. Creating a list of Questions is optional.

In the lower tier of the form, click on the Questions tab.

The Questions tab is divided into two sections. On the left is where the select Question is listed. On the right is the list of possible Question Types. Drag a question type on the right and drop to the left side of the page.

There are seven field types available in the Question Toolbox:

- Dropdown List: A dropdown list displays the options for a user to choose.
- Checkboxes: In Quick Quote, each checkbox option defined in the Sales Package is displayed. A user can select as

many checkboxes as desired.

- Multiple Choice (Radio buttons): In Quick Quote, each multiple-choice option in the Sales Package is displayed. A user can select can only select one of the choices.

- Text Input: Free form text

- Number Input

- Multi-line Input: add multiple lines of text using the enter key to generate an additional line. Also uses word wrap.

- Date: Users can edit the placeholder label of each of the Question Toolbox data types. For example, the date field might be "Requested Installation Date".
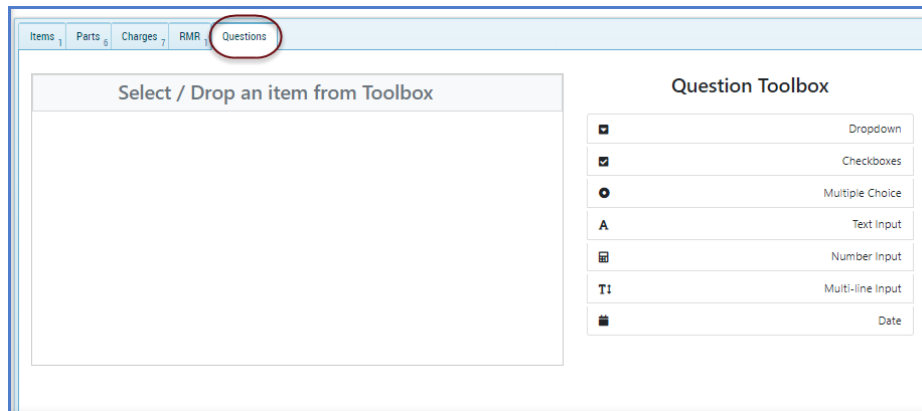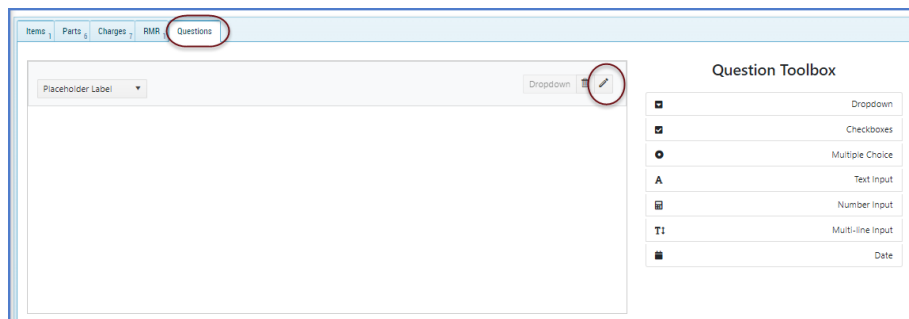

In our examples, we will be adding a dropdown, a checkboxes, and date type questions to our sales package.

Adding a Dropdown type Question

We have dragged and dropped the Dropdown question from the Question Toolbox. Click on the pencil icon to edit the question properties.

The Dropdown Editor form will be displayed. In the Label field, type in the name of the Question. If a selection in this field is required, check the Required checkbox. Under Options, two fields are displayed – Option 1 and Option 2. Over type each one with one of the responses to the question. If you have more than two selections, click the Add Option button. When finished, click the Save button at the lower right.
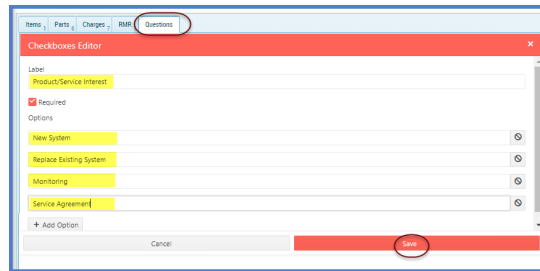
Below is an example of our completed dropdown type question.

Adding a Checkboxes type Question

We have dragged and dropped the Checkboxes question from the Question Toolbox. Click on the pencil icon to edit the question properties.

The Checkboxes Editor form will be displayed. In the Label field, type in the name of the Question. If a selection is required by the user, check the Required checkbox. Under Options, two fields are displayed – Option 1 and Option 2. Over type each one with one of the responses to the question. If you have more than two checkbox labels, click the Add Option button to enter another checkbox selection. When finished, click the Save button at the lower right.

Below is an example of our completed checkboxes type question.

Adding a Date type Question

We have dragged and dropped the Date question from the Question Toolbox. Click on the pencil icon to edit the question properties.
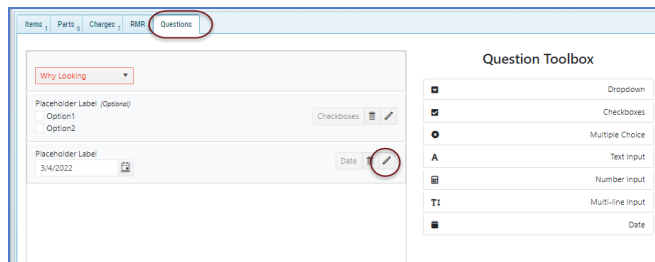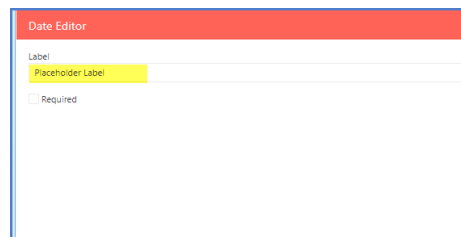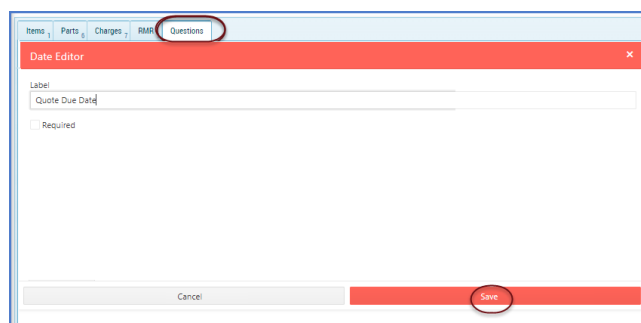

The Date Editor form will be displayed. In the Label field, type in purpose of the date field. If an entry is required by the user, check the Required checkbox. When finished, click the Save button at the lower right.

Below is an example of our completed date type question.

When finished building your Sales Package, click on the Save button at the upper right corner of the page.

Edit Sales Package   ✖ Cancel   💾 Save

Name	02 Res Intrusion PKG B		Job Type	Intrusion-Res ▼	❓
Description	Panel, 2 contacts, 3 motions, 1 keypad, 1 keyfob		Labor Item	Select a Labor Item: ▼	❓
			Labor Rate	$0.00	❓
	992 characters remaining		Labor Cost	$40.00	❓
			Discount Item	Select a Discount Item: ▼	❓
			Discount %	0.00	❓
			Discount Amount	$0.00	❓

Items Total	Parts Total	Labor Total	Package Total	Discount	RMR Total
$1,500.00	$864.58	$0.00	$2,364.58	$0.00	$35.00

Items · | Parts · | Charges · | RMR · | Questions